Transfer Request
Part-time, Seasonal, Temporary (PST) Retirement Plan
457 Deferred Compensation Plan

Now that you're a member of CalPERS, you may transfer your PST Retirement Plan funds, at no cost, to the Savings Plus Program's (SPP) 457 Deferred Compensation Plan's Savings Pool. Once transferred, you will receive a personal identification number (PIN). You will be able to redirect all or a portion of the funds to any of the other investments offered through SPP. Redirections may be done via Voice Response System (VRS) using your PIN or by submitting a SPP Redirection Request.

Part A—Please type or print in black or dark blue ink.

✎ Participant Name (Last, First, Middle Initial)	✎ Social Security Number / /	
✎ Mailing Address	✎ Daytime Phone (include area code) ( )	
✎ City, State, Zip Code	✎Date of Birth / /	Male ☐ Female ☐

Part B— By signing this form,

I understand I have transferred my PST Retirement Plan funds to the SPP 457 Deferred Compensation Plan. Once transferred, a $2.00 administrative fee will be charged to my account each month. I will be able to redirect all or a portion of the funds to any of the other investments offered through SPP either through Voice Response System (no fee) or by submitting a SPP Redirection Request ($10.00 fee).

Participant Certification

✍

Signature Date

Return completed form to:

Department of Personnel Administration
Savings Plus Program
1800 15th Street
Sacramento, CA 95814-6614

❑ **Please send me additional information on the Savings Plus Program.**

SPP is a voluntary program that offers eligible employees the opportunity to invest pre-taxed income in two plans authorized by the Internal Revenue Code (IRC)—Deferred Compensation Plan (IRC 457) or Thrift Plan (401k). Both plans are designed as long-term savings and investment program to supplement retirement income. All invested funds, including earnings and dividends, grow on a tax-deferred basis until withdrawn.

Privacy Statement

The Information Practices Act of 1977 (Civil Code Section 1798.178) and the Federal Privacy Act (Public Law 93-579) require that this notice be provided when collecting personal information from individuals. Information requested on this form is used by the Savings Plus Program for purposes of identification and account processing. It is mandatory that you furnish all information requested on this form. Failure to provide mandatory information may result in actions requested not being processed.

(SPP 661/Rev 6-1999)